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About the Training Basics Series

ATD’s Training Basics series recognizes and, in some ways, celebrates the fast-paced, ever-changing reality of organizations today. Jobs, roles, and expectations change quickly. One day you might be a network administrator or a process line manager, and the next day you might be asked to train 50 employees in basic computer skills or to instruct line workers in quality processes.

Where do you turn for help? The ATD Training Basics series is designed to be your one-stop solution. The series takes a minimalist approach to your learning curve dilemma and presents only the information you need to be successful. Each book in the series guides you through key aspects of training: giving presentations, making the transition to the role of trainer, designing and delivering training, and evaluating training. The books in the series also include some advanced skills, such as performance and basic business proficiencies.

The ATD Training Basics series is the perfect tool for training and performance professionals looking for easy-to-understand materials that will prepare nontrainers to take on a training role. In addition, this series is the consummate reference tool for any trainer’s bookshelf and a quick way to hone your existing skills.
When I first began work as a trainer, I was initially surprised at how useful and effective job aids always seemed to be. Starting out in training, perhaps I was guilty of assuming that if a solution didn't involve formal, structured training as a means of passing on knowledge, it couldn't be effective. Additionally, I really couldn't appreciate the value of something that can be as simple as a laminated piece of paper small enough to fit in a shirt pocket.

In any case, early in my career I tended to view job aids as adjunct or support items to the primary solutions I proposed and delivered. So, it never ceased to amaze me that the job aid often seemed to be as or more effective in producing results than the primary solution. When I learned how to conduct return-on-investment analysis, I was stunned to see how the magnitude of the payoff of job aids compared with other options such as traditional classroom training or organization development initiatives. I probably spent the first five years of my consulting career underestimating the impact of job aids on performance, only to be reminded again and again of their potential effects on the bottom line. Conversations with frontline performers reinforced how valuable job aids can be.

Fortunately, I’ve learned from my early mistakes, and I’ve come to rely heavily on job aids, which are often the most effective and sensible approach to getting results for clients. These days, when internal and external consultants are pressured to generate results quickly with minimal resources, job aids are often the best approach to boost performance. Additionally, there are times when a dispersed or international workforce can’t come together for instructor-led training and may not have the technology and budget for e-learning solutions. Even when face-to-face training, e-learning, or some blended solution is workable, a job aid may be a critical support tool to ensure that the training “sticks” or that application occurs accurately and completely. And the possibilities with job aids on mobile devices open up a whole new world for performance support.

Even if a job aid doesn’t have the greatest impact on improving performance, sometimes it’s the only realistic option in these fast-paced, resource-constrained times. To summarize: If you aren’t
looking at job aids when you design solutions for your clients (either as a stand-alone solution or something to augment another initiative), you’re missing out. Even when other approaches are your primary solution, job aids can really enhance implementation and application.

This book is a second edition. Why write a second edition on this topic—what has changed? Well, when I wrote the first edition, the concept of content on mobile devices wasn’t a practical consideration for most organizations or instructional designers. Additionally, I’ve added a lot more detail about job aid tips and tricks, especially around specific job aid formats. So I think this second edition not only covers a critical area that has emerged in the 15 years since the original book, but also is a more user-friendly version that provides expanded practical detail on application.

In short, job aids have never been more important.

Who Can Benefit From This Book?
This book is aimed at providing you with the practical basics of job aids and their use and design. It was written specifically for people who have little or no experience in developing job aids. You’ll find little emphasis on theory, models, or the pertinent literature in this book. The focus is on a practical understanding of the development and use of job aids. If you don’t know much about job aids, this book is a very good place for you to start.

You could be an instructional designer who has mostly created training or perhaps technical manuals. You could be a team leader or subject matter expert who has never been responsible for training, but now is expected to help get better performance from teammates. You could be a manager seeking to help new hires with work transitions, where onboarding efforts aren’t sufficient to acclimate performers. Or maybe you’re just looking for ways to do your own job better. For anyone in the situations I’ve just listed, this book is for you.

I want to make an important point about the job aid examples presented in this book. I’ve tried to offer a range of examples, including some from different consultants whose work I admire. In some cases, I provide general advice for formatting job aids, but not all the job aid examples adhere strictly to some of that advice. The formatting rules aren’t absolute, and I also wanted to show job aids from a variety of different sources, including some very good consultants who have different standards for formatting. Seeing different looks and styles for job aids is an intentional strategy of this book, allowing you to compare them and form your own standards.

Plus, it’s important to recognize that very few rules about job aids are absolute; a good designer knows when to break one rule in favor of another. One of the challenges in designing
a job aid is that basic design rules (such as providing plenty of white space and explaining conditions for use) often come into conflict, making it necessary for the designer to determine which rule to break. So keep this in mind when we cover ground rules and tips for effective job aid design.

**How This Book Is Organized**

*Job Aids Basics* first outlines the various uses for job aids, and the kinds of job aids you’ll encounter. Chapter 1 is a great primer for those who are unfamiliar with the concept of job aids; it describes what is—and isn’t—a job aid, and explains their use in improving human performance. Similarly, chapter 2 details the common kinds of job aids—you’ll be surprised at how simple some job aids can be!

Not every situation calls for a job aid, and chapter 3 can help you determine when to use one, along with which format is best. As I mentioned earlier, mobile devices have become a great new job aid platform in recent years. Chapter 4—new to this edition—shows you the smart way to create job aids for these devices, as well as how to avoid common mistakes people make when designing and implementing these types of job aids.

The second half of the book is devoted to the process of designing, implementing, and evaluating job aids. Chapter 5 reviews the steps to developing a job aid, including the proper impetus, or trigger, for creating one. Chapter 6 offers tips for building a better job aid, along with design best practices. Chapter 7 describes how to test and roll out a job aid so that people will actually use it, and chapter 8 will show you how to determine if the job aid accomplished the business objectives you set out to meet. Finally, chapter 9 wraps up with common mistakes people make throughout the job aid process, and how to avoid them.

**Icons to Guide You**

This book has plenty to offer in the way of content that can help you every day. Some icons will alert you to key features of the book.

**What’s Inside This Chapter**

Each chapter opens with a short summary that serves as a quick reference to the chapter contents. Use this section to identify the information in the chapter and, if you wish, skip ahead to the material that is most useful to you.
Preface

**Basic Rules**
These rules are important concepts that are true in most instances.

**Noted**
This icon flags sections with greater detail or an explanation about a concept or a principle. Sometimes it is also used for a short but productive tangent.

**Think About This**
These are helpful tips that you can put in your back pocket to pull out when needed as you prepare to design a job aid.

**Getting It Done**
The final section of each chapter supports your ability to take the content of that chapter and apply it to your situation. The focus of this section is mostly on job aids and tools for understanding the content. Sometimes this section contains a list of questions for you to ponder, sometimes it is a self-assessment tool, and sometimes it is a list of action steps you can take to improve your skills and help increase the chances for participant success.

**Acknowledgments**
This book could not have been written without the support, advice, and wisdom of many people. Joe Harless was one of the first voices in the performance wilderness calling attention to the power of job aids. Allison Rossett is a giant on this topic, and her work has been a great resource; nearly every book, presentation, or paper on the subject draws upon her contributions.

A host of consultants have entertained my foolish questions and shared their wisdom over the years while patiently explaining the error of my ways. I thank Paul Elliott, Joyce Kozuch, Michael Balbirer, Ethan Sanders, Mary Broad, George Piskurich, Geary Rummler, Dennis Mankin, Ken Kincaid, Janet Bernhards, Laurel Rosinger, Phil Anderson, Tim Griles, Cynthia Denton-Ade, Marcy Greenberg, David Mosher, and Rebecca Birch for insights that have contributed in various ways to this book.

And there are a number of people who made critical contributions to this second edition, particularly around content involving mobile devices. I want to offer thanks to Ann Rollins, Britney Cole, Taylor Bixler, Joe Ganci, Cindy Huggett, and Shannon Tipton. Many clients have
allowed me to see their work and shared their insights and mistakes. All these folks have broadened my understanding of job aids and performance. Their contributions are reflected in the advice contained in this book.

I also want to acknowledge a group of designers and performance consultants who allowed their work to be used in this book as examples. Specifically, I want to thank Cynthia Denton-Ade, Geary Rummler, Timon Hazell, William Wake, and Bill Horton. I also acknowledge my son David for his support with graphics and production. As is true for many of his generation, he’s more computer literate than his parents are. Several of the job aids examples in this book are a result of his work.

Last of all, I wish to thank my wife, Cathy, for her support and encouragement throughout the entire process. Being married to a writer is no easy task, but she has proven herself to be a saint.

Joe Willmore
September 2018
1

Why Focus on Job Aids?

What’s Inside This Chapter

In this chapter, you’ll learn:
• what a job aid is—and isn’t
• why job aids are so critical for trainers and performance consultants
• how to navigate this book to find specific information.
Why Focus on Job Aids?

You’ve probably heard the term *job aid* before. If you’re a trainer, instructional designer, or someone who provides support to performers, you probably have experience developing job aids. Or, maybe you’ve read some of the literature explaining how job aids are such an effective and cost-productive means of providing just-in-time performance support, and they sound like a good fit given the time-urgent client demands you face. You may have heard references to performance support tools and quick reference guides and wondered if they’re the same as job aids. You may even be under pressure from management to create some “apps” to use on phones or tablets for people out in the field. Do those count as job aids as well?

Regardless of your reason, the act of picking up this book probably means you have some practical questions about job aids you’d like answered.

Well, the good news is that understanding job aids and learning how to design them isn’t rocket science. This book was written with you in mind. It’s an introduction to job aids, so you’ll know what they are and how they’re used. And while this book doesn’t go into detail about programming apps, it also looks at remote or web-based resources that enhance work performance.

Additionally, this book is a practical guide to designing and developing job aids. The material here focuses on delivering plenty of application advice, such as what type of job aid to use in particular situations and tips for designing specific job aids. Therefore, this book is full of job aid examples, as well as activities to help you apply what you learn.

As you read the chapters, you’ll start to notice a range of job aids in your world. In fact, you’re surrounded by job aids. There are plenty of job aids—both well designed and not—that you encounter in your daily life. Some of those job aids have been so integrated into people’s everyday routines that most fail to recognize them for what they are. That’s fine; one sign of a good job aid is that it’s accessible and easy to use when it’s needed, yet invisible or unobtrusive when it’s not. Part of your education about job aids can start by evaluating the job aids that
Why Focus on Job Aids?

surround you. Start by noticing some of them—on kitchen appliances or in your car—and think about how helpful or confusing they are, what design elements work or get in the way, and the degree to which they support a particular task.

Why Use Job Aids?

Job aids are designed to provide information to support performers on specific job-related tasks. Joe Harless (1996), in his work with the Harless Performance Guild, found that the majority of performance problems could be attributed to information issues. Job aids are designed to help address performance problems due to information issues. Therefore, job aids are likely to be an appropriate solution for a range of problems in most organizations.

Additionally, job aids are often a very cost-effective solution (Harless 1986) to many performance problems. In instances where an organization can choose from a range of possible solutions to deal with a problem, job aids often have the highest return on investment (ROI). This is because job aids typically don’t involve the costs of such other options as training, conferences, or various kinds of information technology (IT) tools. The U.S. Coast Guard (2003) found that most job aids can be developed 75 percent faster than training on a similar subject and that when job aids are available, the amount of time necessary for training is reduced substantially.

Basic Rule 1

The purpose of a job aid is to support the performer. Therefore, the job aid should be easy to access and use, but it shouldn’t get in the way when it’s not needed.

Noted

You create a job aid to improve performance on a specific task. But, the performance improvement doesn’t happen if the performers won’t use the job aid you create. In designing job aids, you should never lose sight of the performance context. Job aids that look great or have superb detail may be difficult for performers to use if they don’t want to appear ignorant to customers, or they might take too much time to access and utilize. They may also take up too much memory or bandwidth to be practical in the field; this is particularly true when we consider phone apps and web-based tools. So, you need to understand the performers, the situation they work in, and what barriers exist to using a job aid. Consequently, accessibility, ease of use, and unobtrusiveness are critical for successful job aids.

Job aids can usually be deployed much more quickly than organization-wide training as well. Even in instances where a job aid may not be as effective as another solution, on balance the job
aid may still have a much higher ROI. Therefore, because of scarce resources and competition for your time, there will be many instances where a job aid will be the solution of choice for a wide range of performance gaps.

Take the example of office equipment theft. If employees forget to lock outside doors when leaving for the day, some office supplies or equipment might be stolen from time to time because the building is not secure. The company could invest in security systems and automated doors that lock after closing time. This would likely eliminate the theft problem. A job aid, such as a sign by the door, reminding the last employee to leave for the day to lock the door would probably reduce the problem, but because the job aid won’t be 100 percent effective (sometimes a person will forget to read the job aid or get distracted on the way out of the door), some theft will still occur. However, it’s likely that the cost of the security and automation system would be so much greater than the cost of the job aid that even with some reduced level of theft (rather than complete elimination of the problem), the job aid approach has a superior ROI.

Basic Rule 2

Job aids typically have higher ROI percentages than other solutions. Because job aids typically minimize the amount of time performers need to be away from the job, even a job aid that only reduces (rather than eliminates) a performance gap usually generates ROI results that are much greater than competing solutions.

Even when a job aid isn’t the solution to a problem, it usually will be an effective way of boosting application and enhancing performance. Think of job aids as training reinforcement. They remind performers about what to do or how or when to do it—all things they were supposedly trained on. So to increase training application and retention, it often makes sense to provide a job aid to help reinforce what you covered during training.

Figure 1-1 is a job aid created by Timon Hazell, a computational design leader and speaker in the architecture, engineering, and construction industry. It deals with Autodesk Revit, a building information modeling design program used by engineers, architects, and contractors. The idea was to create a one-page job aid for employees to post by their computer after they’re trained on the program. Then, after one or two months of initially using the program, the job aid would no longer be necessary because employees would have memorized the keyboard shortcuts.
Why Focus on Job Aids?

So while the job aid is much more text heavy than what we’d typically use, it’s appropriate for this specific task—providing an alternative to a 100-plus-page manual that can be taped next to the user’s monitor and aid in memorization post-training.

Figure 1-1. Autodesk Revit Job Aid Example

Structurally Focused Revit Keyboard Shortcuts (modified from default Revit settings)

<table>
<thead>
<tr>
<th>Shortcuts</th>
<th>CommandName</th>
</tr>
</thead>
<tbody>
<tr>
<td>AA</td>
<td>Adjust Analytical Model</td>
</tr>
<tr>
<td>AR</td>
<td>Analytical Reset</td>
</tr>
<tr>
<td>RA</td>
<td>Reset Analytical Model</td>
</tr>
<tr>
<td>BF</td>
<td>Bring to Front</td>
</tr>
<tr>
<td>BL</td>
<td>BIM List Browser—to Load Families</td>
</tr>
<tr>
<td>DA</td>
<td>Angular Dimension</td>
</tr>
<tr>
<td>DC</td>
<td>Detail Component; Detail Component</td>
</tr>
<tr>
<td>DI</td>
<td>Aligned Dimension</td>
</tr>
<tr>
<td>DL</td>
<td>Detail Line</td>
</tr>
<tr>
<td>EL</td>
<td>Spot Elevation; Spot Elevation</td>
</tr>
<tr>
<td>FR</td>
<td>Filled Region; Filled Region</td>
</tr>
<tr>
<td>LN</td>
<td>Linework</td>
</tr>
<tr>
<td>SY</td>
<td>Symbol—Annotation</td>
</tr>
<tr>
<td>TB</td>
<td>Send to Back</td>
</tr>
<tr>
<td>VR</td>
<td>View Reference</td>
</tr>
<tr>
<td>AL</td>
<td>Align</td>
</tr>
<tr>
<td>AR</td>
<td>Array</td>
</tr>
<tr>
<td>CD/CC</td>
<td>Copy</td>
</tr>
<tr>
<td>DM</td>
<td>Mirror—Draw Axis</td>
</tr>
<tr>
<td>PM</td>
<td>Mirror—Pick Axis</td>
</tr>
<tr>
<td>MM</td>
<td>Move</td>
</tr>
<tr>
<td>QP</td>
<td>Offset</td>
</tr>
<tr>
<td>RO</td>
<td>Rotate</td>
</tr>
<tr>
<td>SL</td>
<td>Split Element</td>
</tr>
<tr>
<td>TE</td>
<td>Trim/Extend Multiple Elements</td>
</tr>
<tr>
<td>TR</td>
<td>Trim/Extend to Corner</td>
</tr>
<tr>
<td>PA</td>
<td>Paste:Aligned to Current View</td>
</tr>
<tr>
<td>CS</td>
<td>Create Similar</td>
</tr>
<tr>
<td>EH</td>
<td>Hide in View:Hide Elements</td>
</tr>
<tr>
<td>ES</td>
<td>Edit Sketch</td>
</tr>
<tr>
<td>KS</td>
<td>Keyboard Shortcuts</td>
</tr>
<tr>
<td>MA</td>
<td>Match Type Properties</td>
</tr>
<tr>
<td>ME</td>
<td>Measure:Measure Between Two References (Temporary Dimension)</td>
</tr>
<tr>
<td>RL</td>
<td>Reload Latest</td>
</tr>
<tr>
<td>SV</td>
<td>Select All Instances: Visible in View</td>
</tr>
<tr>
<td>SA</td>
<td>Select All Instances: In Entire Project</td>
</tr>
<tr>
<td>WP</td>
<td>Set Work Plane</td>
</tr>
<tr>
<td>AS</td>
<td>AutoSection Box</td>
</tr>
<tr>
<td>SH</td>
<td>Close Hidden Windows</td>
</tr>
<tr>
<td>WT</td>
<td>Title Windows</td>
</tr>
<tr>
<td>ZA</td>
<td>Zoom All to Fit</td>
</tr>
<tr>
<td>ZF/Z2</td>
<td>Zoom to Fit</td>
</tr>
<tr>
<td>ZR/Z2</td>
<td>Zoom in Region</td>
</tr>
</tbody>
</table>

This list of keyboard shortcuts has been compiled by Timon Hazell for Silman and can be installed on your Revit. In order to add these keyboard shortcuts follow this process: Open any revit file. Type KS. Import file from “L:\Drafting Resources\Revit Settings\Silman KeyboardShortcuts.xml”. Select “Overwrite Existing Shortcut Settings” (repeat for each version of Revit on your computer).

Source: Adapted from Timon Hazell. Used with permission.
Here’s another way to evaluate the efficacy of job aids: Compare how a job aid can clarify and remind a performer of details that are difficult to remember. For example, one organization had a problem with workers logging on to workstations to access a critical database. The problem was twofold. First, the data on the workstations needed to remain confidential and secure, so it was necessary to use a sign-on process to make sure that unauthorized users of the database were denied access. Second, because performers rarely needed to use that database, they tended to forget the login procedure. The result was wasted time, extra demands on the help desk, false alarms to system security, users’ inability to access the database when needed, and at least three workstations that were damaged or destroyed beyond repair by frustrated users who failed in their attempts to sign on.

The organization attempted to deal with this problem by developing a set of instructions for signing on to the workstation. When the instructions failed to solve the problem, it developed a job aid. Compare the instructions (altered to protect security procedures for the organization in question) with the job aid that follows and judge for yourself the value of the job aid.

Here is the text taken from the manual with instructions for signing on to a computer workstation:

All database workstations are secure and require multiple levels of user identity verification before the user can access the system or utilize the workstation. Prior to using the workstation, user authentication must take place. User identity must be verified by the user directly and individually by providing a user work number, user-specific password, and user name. For user name, users should be consistent with agency protocol. User number, user password, and user name will have been assigned prior to utilizing the system and refer to the employee identification number, the individually determined password, and the login name. The system logon sequence will also ask the user to confirm his or her identity. This is done by typing in “yes” at the appropriate place in the sequence. The sequence in which the data is entered is critical for security approval. Nor is there a need to hit “enter” for each data query. Instead, this is necessary only at the conclusion of each screen. However, all queries must be complete. Failure to respond to any requested data will result in a denial of system access. Occasionally access will be denied. This is usually because of data entry errors by the user in the verification process. None of the data queries are case sensitive, but users must be sure that accurate replies are entered to each verification
query. Should access be denied, users will be allowed one additional attempt to authenticate identity. Subsequent authentication attempts should not be attempted. Repeated failures at authentication will shut down the workstation and alert corporate security of a security violation with the database. Therefore, users who encounter two verification failure attempts should contact security at extension 3244 prior to proceeding further or attempting to log on. This is necessary to prevent workstation shutdown, authenticate user identity, and troubleshoot potential problems with the workstation user identity process. Although most errors are due to user error, there are occasionally system errors that are not due to user entry. In such cases, only corporate security is able to resolve such problems. Be sure to enter all data accurately to minimize authentication errors.

Here is the material from the instructional manual in the form of a job aid that was produced on a laminated sheet and attached to the side of the computer monitor:

1. When the system is on, a login screen will appear on the monitor.
2. Enter login name.
3. Enter password.
4. Hit “enter” on the keyboard.
5. When the corporate logo appears on the next screen, enter your employee identification number (the number on the front of your badge).
6. When the system asks you to confirm your name, type “yes.”
7. You will be denied access after two failed attempts. Hit “enter” and you’ll be granted access to the workstation. Important: If you are not initially granted access, you can repeat steps 2-7 in order one more time. Then you must contact corporate security at extension 3244. Do not try to log on to the workstation after two failed attempts.

Practically all training that either involves a significant delay before the new skill or knowledge is applied on the job or skills that are used infrequently would benefit greatly from a supporting job aid. This is because people get rusty or they forget key details unless they use what they learned right away.
Notice several key differences between the original instructional manual and the job aid. The original instructions indicate that the sequence of tasks is critical. For example, if the user doesn’t enter the information in the correct order, then the computer won’t allow the performer to log on to the system. However, this information is buried deep in the original instructions and would probably be missed by someone attempting to log on while simultaneously reviewing their instruction manual. In contrast, the job aid uses numbers to indicate clearly that the tasks are to be performed in a specific sequence, ensuring that users do not skip material or jump around. Additionally, the job aid provides the content in the sequence that the user will need the information (login name, password, and then employee identification number).

The original instructions are a mass of text that is difficult to read, especially when trying to perform another task, such as logging on to the computer workstation. The job aid offered plenty of white space and eliminated much of the text for clarity. White space is critical if the performer is likely to be switching eye contact from the job aid to a task or tool (in this case, the workstation screen).

---

**Basic Rule 3**

Less is more; job aids generally benefit from less text and less explanation. That’s because job aids are often meant to be used while performing. More text or explanation is likely to interrupt the task and detract from performance, and might also discourage the performer from using the job aid. That’s why it’s always critical to consider the situation the performer is likely to be using the job aid in.

Finally, the job aid was designed for just-in-time availability or multitasking. The content in the instructional manual would likely be forgotten by the time the user had to attempt to log on to the system because the training would have occurred months or even a year before the worker would ever need to use the database. The job aid was designed with the recognition that the person using the job aid probably would be attempting to sign on at the same time they were referring to the job aid. Therefore, the job aid allowed for quick understanding of key points and sequence while reducing the potential for confusion.

**What’s a Job Aid, Anyhow?**

If you’re new to job aids and don’t have an extensive background in instructional design or performance consulting, you probably have only a vague sense of what people mean when they
refer to a job aid. You probably know what the concept of a job aid is, but you might not be exactly clear on what is and isn’t a job aid. Let’s take a look at what constitutes a job aid.

Job aids can take many forms, and they utilize a range of formats and media. Some examples of possible job aids are:

- a three-dimensional (3-D) scale model or a replica
- a picture
- a checklist
- a manual or an information guide
- a computer help screen or pull-down menu
- a to-do list
- presentation notes
- a buzzer, bell, or alarm that goes off as a reminder of when to do something
- a troubleshooting guide
- software that shows the group meeting schedule
- reminders or guides that appear on a mobile device like a phone or tablet.

Understanding Human Performance

Before diving deeper into what is and is not a job aid, it’s valuable to get some perspective about human performance. Ethan Sanders and Sivasailam Thiagarajan (2002) developed a model for ATD (based in part upon Thomas Gilbert’s behavioral engineering approach) that breaks down the six critical areas for identifying the cause of a performance gap and determining what solutions to use to close that gap:

1. **Structure or process:** This category deals with how the work and performers are organized. It includes company policies, reporting relationships, work sequence, work flow, job description, and organizational mission and vision.

2. **Resources:** This category includes any kind of tool, whether it be shovels, backhoes, computers, sufficient staffing, appropriate funding amounts, or adequate amounts of time for the work assigned. Resource factors typically involve getting more of a particular resource or improving its quality.

3. **Information:** This category includes having clear direction about priorities, receiving feedback from customers, getting timely and accurate performance feedback, and being apprised of meetings or other relevant activities. It’s important to note that information
as a category is not about teaching the performer how to do a particular task. Rather, if
information is the cause of the performance gap, that means the worker has the ability or
skills to do the work but is missing some data that would allow them to use the appropriate
skills to produce the desired result. For instance, you may know how to open a door,
but the sign on the door informs you whether you should push or pull to open the door.

4. **Knowledge or skills:** This category includes providing various types of training, hiring
smarter or more skilled performers, and redesigning tasks so they require less knowl-
edge. It addresses the basic issue of whether the performer has the ability to do the job.

5. **Motivation:** This category includes worker burnout issues, incentives and bene-
fits, unfair treatment or discrimination, and worker commitment to organizational
purpose. Motivation has to do with whether the performer wants to do the job well or
if there are other factors that outweigh incentives to perform. For instance, confusing
situations or materials can be demotivating.

6. **Wellness:** This category includes work-related injuries, fatigue, mental illness,
emotional trauma, and other factors that mean a performer is physically, emotionally,
or intellectually under their usual performance levels. For instance, boredom may
reduce alertness, leading to sloppy mistakes. Wellness addresses whether the employ-
ee’s health or variations in physical or emotional state could alter performance.

**Think About This**

How would you use job aids to help with wellness issues? People working overnight, for example, are likely
to be very sleepy near the end of their shift. With sleep deprivation comes forgetfulness. So a checklist
reminding performers of key actions or emphasizing a proper sequence would probably be a good thing.

This six-part model is critical to understanding job aids. Job aids aren’t meant to close all types
of performance gaps; rather, they are designed to provide information. Therefore, they can directly
address only one of the six factors that affect performance. Now, it is true that a job aid could posi-
tively affect motivation. For example, if a worker receives a job aid, they might feel more confident
and thus better motivated to take on challenging tasks. Or, a job aid might inadvertently provide
a performer with critical knowledge that enhances their ability to do the job. But even though it
might affect motivation or build skills, that is not the initial intent behind the use of the job aid.
Instead, enhanced motivation or skills are a side effect of the tool.
Furthermore, just as it’s a mistake to throw training at a problem that is not related to knowledge or skills, it is also a mistake to use a job aid to address a problem that a job aid cannot solve. Therefore, one of the prerequisites to prescribing a job aid is to be sure that a job aid is the correct way to improve that performance problem. As mentioned, job aids are designed to address performance problems due to information issues. If customer service continually breaks down because the shipping process results in a failure to fill customer orders, creating a job aid will not fix the process and therefore won’t solve the problem.

While job aids address information issues (and not all organizational problems are information issues), they can be effective tools to help design workarounds. Specifically, if a process is broken or if the performers lack the appropriate tools—for example, if software tends to crash because it is outdated—a job aid can help performers work around those issues. A workaround is really no more than a temporary solution and not the ideal way to address these kinds of problems.

However, it is important to note that if you do fix this problem (failure to fill customer orders) by changing the shipping process, you may need to create a job aid to inform and remind workers of the new process. Therefore, job aids will often be a critical support tool for a range of solutions. An organization may change resources by upgrading computers, improve skills by providing training, seek to motivate by improving benefits, or enhance wellness by providing a workout room. Job aids may support any of these solutions: providing details about how to use the computers effectively, offering reminders about the training content or new benefits, and notifying people about the workout room use policy.

Performance gaps fall within six areas—structure or process, resources, information, knowledge or skills, motivation, and wellness (Sanders and Thiagarajan 2002). Job aids address only performance gaps attributable to information issues. However, solutions dealing with process or knowledge usually benefit from information provided by job aids. And job aids may indirectly help with other non-information-related performance gaps. For instance, you can use job aids to provide reminders and refreshers about training or new policies and processes being implemented to improve performance.
Jeannette Gautier-Downes and Allison Rossett (1991) have a widely accepted definition of what constitutes a job aid: It is “a repository for information, processes, or perspectives that is external to the individual and that supports work and activity by directing, guiding, and enlightening performance.” Several key points of this definition are important to understand.

First, consider the term repository. A job aid stores information for performers and then makes that information accessible or available. That’s the primary purpose of a job aid. Now, does a repository of information sound like a bookstore, library, or filing cabinet to you? Even though they may be places to find information, they aren’t job aids. Libraries, bookstores, and filing cabinets may have content that can teach you how to do something (knowledge or skills). They do provide data on a wide range of subjects, but for our purposes, a job aid is designed with a specific task or performer in mind. Many things can be repositories of data, but they are not necessarily job aids.

Second, think about the phrase external to the individual. Performers are asked to remember all sorts of information that is critical to their job. That is where job aids come in. Sometimes the stress of work or the sheer volume of information makes it difficult to recall key facts. Or it’s essential that the performer react consistently every time. Or workers may use the information so infrequently that it’s easy to forget details or jumble a critical sequence. Job aids can help with all these issues.

Third, the phrase supports work is what helps separate a job aid from something like a library. A job aid exists to support a specific task or performer, but it is not designed to primarily teach or instruct. It is not a repository of data that various individuals may choose to use in any manner that benefits them. Instead, a job aid is designed to facilitate a specific task or assignment.

Here is the definition of a job aid that this book uses: A job aid is an external resource designed to support a performer in a specific task by providing information or compensating for lapses in worker memory or skill.

How does this differ from the definition of Gautier-Downes and Rossett? The term specific task indicates that a job aid is designed to help a performer with a particular piece of work or assignment. Absent this distinction, it becomes more difficult to distinguish between a job aid and general data sources that have no purpose other than to be useful. For instance, a job aid can provide specific information relevant to a task, like a list of phone numbers to deal with escalation of customer problems. A directory of all company phone numbers, names, job titles, locations, and email addresses would still have those phone numbers, but it isn’t designed with a specific task in mind—it’s just a general information repository. Also, providing information or compensating for lapses in worker memory or skill emphasizes that it’s important that job aids be used only for performance problems that job aids can solve. At the point that instruction or
training takes place, it’s migrating from a job aid to training of some sort. Job aids aren’t designed to improve motivation or teach people how to do things they don’t know how to do or can’t currently do. Instead, they address information issues.

These two distinctions (*specific task* and *providing information*) are important ones to make because they pertain to issues of design and evaluation. If you want to design an effective job aid, you need to be clear about its purpose and capabilities. Therefore, it is critical to target a specific task rather than look to produce something that is just a general resource without a performer or task in mind. Furthermore, the purpose of a job aid is to improve performance and thus obtain better results. So, it’s important to emphasize providing information as a means of boosting performance. Finally, by emphasizing the specific task and providing information, this definition highlights two factors that are critical to distinguishing job aids from tools and instructional materials.

Some have referred to job aids as “performance support tools” or “task aids” (Long 2004). There are many things that support performance or help people to do tasks. Practically any tool—from a bulldozer to a telescope to a wireless phone to a help desk—could be something that aids in a task or supports performance. Therefore, it’s not sufficient to argue that something that helps a performer is a job aid. That would destroy the distinction between a job aid and a tool. A saw is a tool, not a job aid. But a job aid might be attached to the saw, reminding workers how to change its blade safely. The term *task aid* might be a better synonym for job aid. And as previously mentioned, some organizations will use the phrase *quick reference guide*. In any case, it’s important to note that other literature sometimes refers to job aids as performance support tools, QRGs, or task aids.

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<td>What distinguishes a job aid from other resources (such as a tool) is its purpose. A job aid’s purpose is to be a repository for information on a specific task to improve performance.</td>
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Let’s move from the conceptual to the practical. Here are some examples of job aids and the circumstances where they might be appropriate:

- **A recipe for a cake** (to remind the cook about the appropriate amounts and sequence for the ingredients). A recipe won’t do much good if you have never baked before, but for someone with at least rudimentary kitchen skills, it increases the chance of a good cake with fewer wasted ingredients.
• A **preflight checklist** (to make sure the pilot has a safe and operable aircraft before taking off). It won’t teach you how to fly a plane, but for someone who is a qualified pilot, it will make sure you don’t forget something important.

• **A list of password hints for a range of programs that you use on your computer.** You already know the passwords but they’re easy to forget, especially for programs that may be used only occasionally.

• **A grocery list** (so you don’t forget to bring home the eggs for the cake you’re going to bake). You know how a grocery store works, but it’s easy to forget everything you need for this week.

• **A facilitator guide for a trainer.** Someone who knows the content and has taught the course before can benefit from the reminders about key points, timing, and instructions for course activities.

• **A reminder about the day’s specials.** It won’t help you wait tables if you’ve never been a server before, but it’s helpful when specials change daily.

• **The instructions for the life vest under your seat on an airplane.** Your flight attendant already told you how to put it on. But if you need to pull that life vest out, the stress from the moment means that a job aid on how to put it on and inflate it is probably essential. So a well-designed life vest will have instructions printed on it to remind you of what to do.

What do these job aids (and situations) have in common? They involve skills that the worker or user already has—you’re not being trained on how to bake or how to train a class or how to use a computer. They provide information (and reminders). And they recognize situations where a reminder will enhance performance and improve consistency.

**What Isn’t a Job Aid?**

You’ve seen information on what a job aid *is*. Now, let’s take a quick look at what a job aid *isn’t*. There is a tendency to confuse this distinction on the basis of format. For example, because many job aids may consist of a form, such as a checklist or a worksheet, it’s easy to assume that anything that looks similar must also be a job aid.

Remember that something isn’t a job aid because of how it looks, but because of its purpose. If it makes information accessible for a specific task, then it’s a job aid. But, if it instructs someone by telling them how to do something they didn’t know how to do, then it’s a form of training.
and deals with knowledge or skills. If the checklist doesn’t exist to remind a worker what to do but instead is a document that must be filled out to meet job requirements, then it isn’t a job aid but falls within structure or process.

Moreover, something that helps someone to do work better isn’t necessarily a job aid. Providing employees with laptop computers to take on the road might improve performance, but this solution is a tool, not a job aid. If it isn’t about providing information or aiding recall specific to a task, then it isn’t a job aid.

Let’s look at examples of things that might mimic the format of job aids but are not job aids:

• **A job application form that someone fills out when applying for work.** This is part of the work process—it helps the company review applications by standardizing information—but it isn’t a job aid. However, if the job applicant has an index card or sticky note listing key results from their previous jobs (so they don’t forget this information when filling out job applications), that list of key results would be an informal job aid. Just because some job aids use forms (to guide the process or remind the user of key points) doesn’t mean that all forms are therefore job aids.

• **A checklist that is part of training materials** (such as an onboarding or new employee orientation program). The content is presented in the form of a checklist as a way of highlighting and summarizing content, but all of it is new to the learner who needs to acquire these skills. Just because many job aids use checklists doesn’t mean all checklists are job aids—it depends on the purpose.

• **A drop-down menu as part of a software training class.** The software has a series of drop-down screens that provide instruction and next steps for learners. This is a form of training, similar to interactive content like knowledge checks within course materials. Techniques to provide advice aren’t necessarily job aids if they’re part of training materials for people who don’t know how to use the tool.

What’s the Difference Between a Job Aid and a Tool?

It’s easy to confuse job aids and tools initially. The distinguishing characteristic between the two involves their use. A job aid is a repository for information. It may have the effect of enhancing performance by improving user confidence. For example, an experienced speaker might have notes on index cards. The mere presence of the cards might boost the speaker’s confidence, but the purpose of the job aid (the presentation notes on the index cards) is to reduce what the speaker
needs to remember. It is an unintended consequence that the job aid improves confidence and, thus, performance. The primary purpose of a job aid is to hold information so the performer doesn’t need to remember it.

A tool enables a performer to do something that would otherwise be undoable. Examples are a wrench used to tighten a nut, a parachute that allows someone to jump out of a flying airplane and survive the landing, or a software program that allows access to a secure network outside the firewall (so an employee can check corporate email while traveling). Even if the performer could do the task without the tool, the tool allows the worker to do the work faster, easier, or better by increasing precision or consistency. A tool doesn’t exist primarily to provide information or compensate for memory—that’s the description of a job aid. A tool might assist someone with a task, or a tool could even complete it for the worker, such as software that checks for viruses on a computer.

**Noted**

Job aids can be stand-alone items or they can be designed into a tool. Using the three examples mentioned earlier, a wrench is a tool, but if it includes a reminder printed on the side (“lock jack before removing lug nuts”) then it has a job aid included with the tool. If the parachute (a tool) includes an orange handle to release the ripcord (so someone jumping from an airplane can easily find the handle they’re looking for as they plummet to earth), then coloring that ripcord handle orange makes it a form of a job aid through effective visual stimulus. If the software program includes pop-up reminders to the user to log out when finished (so a “door” doesn’t remain open and provide a possible security breech), then that reminder is a job aid.

**Is an EPSS a Job Aid?**

EPSS stands for electronic performance support system. An EPSS is capable of being either a job aid or a tool. Some examples of EPSSs that are also job aids are:

- a file containing a list of task-specific phone numbers and addresses so performers don’t have to remember them all
- an electronic calendar or scheduler that retains meeting commitments so staff members don’t forget when meetings are scheduled
- a pull-down menu within a software program that reminds a user of the correct keystrokes for particular HTML codes.

The key element in all these examples is that the performer already knows how to do the work, but the EPSS aids in memory or provides information. In none of these cases is the EPSS providing a skill that the performer does not already have.
An EPSS can also be a tool and, therefore, not a job aid. For instance, an EPSS can be a GPS device that identifies exactly where the user is located by tapping into GPS satellite signals. An EPSS can also be software that automatically restructures a document to fit new formatting requirements, performs a word count, or analyzes sentence structure for spelling errors. In these cases, even if the performer had the ability to do this work without the EPSS, it serves as a tool either by doing the work for the performer (thus automating the work) or by allowing the work to be faster or more efficient. However, in these examples the EPSS does not compensate for lapses in worker memory. The spell-checking software is faster than a visual check by the performer not because of human memory but because the software tool can review the entire document faster than the human can read it. It is thus more efficient.

It is accurate to say that there is some overlap between job aids and EPSSs. But, not all job aids are EPSSs and not all EPSSs are job aids. The key is to discern the purpose: If it is to provide information or aid memory, then it’s a job aid. If the purpose is anything else, then it’s a tool.

**Getting It Done**

Now that you’ve had an opportunity to get some sense of what a job aid is and the potential value one can provide, review Exercise 1-1, which provides some additional things you can do that will position you for the rest of the book and allow you to apply what you have learned thus far.

Answering these questions can help you to find some job aid samples from your own life as well as possible opportunities. Later in this book, you’ll get a chance to practice developing your own job aids. A good way to start is by finding areas in your own work that would benefit from a job aid. That way you’ll be doing something that has immediate application, you’re familiar with, and will yield a practical return. The next chapter looks at different types of job aids and identifies which circumstances benefit from job aids.
Exercise 1-1. Getting Started With Job Aids

1. Identify at least three examples of job aids that you use in your life. They can be personal or professional uses. If your initial reaction is that you don’t use any job aids, try looking in your kitchen or the dashboard of your car and you’ll find a range of job aid examples to choose from. What did you like about each job aid? In what ways were they cumbersome or poorly designed? To what extent did you need to interrupt a task to use the job aid?

2. Identify at least three examples from your work where a job aid would be helpful but is not currently available. Specifically, think of tasks that require you to use your memory or instances where you tend to forget important information that is necessary to complete the job.

3. Identify at least one instance at work where a job aid might have been a cheaper or more effective alternative to a solution (such as training, an organization development activity, job restructuring, changing of job duties, or automation) that was used to address a performance problem. Why would the job aid have been more effective or less expensive?

4. If you’ve got a smartphone, look at the apps and software you have on your phone. Identify at least one job aid that is embedded in one of the apps or software. And think of a job aid that would be useful to have on your smartphone.
Joe Willmore is president of the Willmore Consulting Group, a performance consulting firm located near Washington, D.C. He has more than 35 years of consulting experience with a wide range of organizations including the World Bank, Intelsat, Lockheed Martin, the U.S. Navy, Booz Allen Hamilton, the National Geographic Society, and the Smithsonian Institution. He has served on ATD’s Board of Directors and held other leadership positions within ATD and other professional societies. His work has taken him to a range of countries and regions outside North America, including Russia, Turkey, Greece, and Central Asia.

Joe Willmore is the author of *No Magic Bullet* (ATD Press, 2009) and *Performance Basics*, 2nd edition (ATD Press, 2016) as well as *Managing Virtual Teams* (Chandos Press, 2003). He was also a contributor to *What Smart Trainers Know* (edited by Lorraine Ukens, Jossey-Bass/Pfeiffer, 2001) and *HPI Essentials* (edited by George Piskurich, ATD Press, 2002). In addition, he has written numerous articles for ATD’s *TD* magazine and other publications.

Joe Willmore lives with his wife in Northern Virginia. When he isn't working, he’s taking photos or with his dog, Ike. He can be reached at joe@willmoreconsultinggroup.com.

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